29th ANNUAL DIGITAL CONFERENCE

Regional Tourism Cooperation

Tourism’s New Normal?: The Impact of the Global Pandemic on Regional Cooperation in Northeast Asia and the Pacific

DIGITAL CONFERENCE AGENDA

Organized by
The Northeast Asia Economic Forum
The International Forum of Northeast Asian Tourism, Japan

In cooperation with
API China
API Korea
Nankai University, China
College of Social Sciences, University of Hawai‘i at Mānoa
Shidler College of Business, University of Hawai‘i at Mānoa
Upspring
AGENDA

Tourism’s New Normal?: The Impact of the Global Pandemic on Regional Cooperation in Northeast Asia and the Pacific
Thursday – September 3, 2020
2:00 p.m. HST
(Please note that all presentation start times are approximate)

14:00 HST
INTRODUCTION AND WELCOME
LEE-JAY CHO, Chairman, Northeast Asia Economic Forum
JOHN WAIHE‘E, Former Governor of Hawai‘i
TAKASHI KOJIMA, Chairman, International Forum of Northeast Asian Tourism, Japan
STEPHEN COWPER, Former Governor of Alaska

14:10
TECH HOUSEKEEPING
Session Tech Moderator

14:15
SESSION CHAIRS OPENING REMARKS
TAKASHI KOJIMA, Chairman, International Forum of Northeast Asian Tourism, Japan
LEE-JAY CHO, Chairman, Northeast Asia Economic Forum

14:20 – 15:20
SESSION PRESENTATIONS
14:20 (15 min) Japan’s COVID-19 Situation and Response for Regional Tourism Cooperation
MASARU SUZUKI, Tourism Expert of the UN World Tourism Organization; Advisor to the Japanese Society of Tourism and Hospitality Educators; Professor Emeritus, Osaka University of Tourism

14:35 (15 min) Findings of the Windward Tourism Project: 2019 Tourist and Resident Sentiment
DAN SPENCER, Professor, School of Travel Industry Management, Shidler College of Business, University of Hawai‘i at Mānoa

14:50 (15 min) Impact of COVID-19 on Hawai‘i’s Tourism Since March 2020
JERRY AGRUSA, Professor, School of Travel Industry Management, Shidler College of Business, University of Hawai‘i at Mānoa

15:05 (15 min) A Path Forward for Tourism in Hawai‘i
STANLEY CHANG, Senator, State of Hawai‘i

DRAFT
TOURISM’S NEW NORMAL?
The Impact of the Global Pandemic on Regional Cooperation in Northeast Asia and the Pacific

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IV. Tourism Promotion in Japan & Regional Cooperation - NEA & The Pacific

Masaru SUZUKI
Prof. Emeritus, Osaka Uni. of Tourism
Tourism Expert - UNWTO
A Member of IFNAT (Int’l Forum of Northeast Asian Tourism)
Recent Tourism (World & Japan)

International Tourist Arrivals

(国際観光客数の推移 & 伸率)

图表 I - 2 国際観光客数の推移

Source: World Tourism Organization (UNWTO) ©

(f) Forecast
## Outlook for International Tourist Arrivals

<table>
<thead>
<tr>
<th></th>
<th>Change</th>
<th></th>
<th></th>
<th></th>
<th>average a year</th>
<th>2020 Projection</th>
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<tbody>
<tr>
<td>World</td>
<td>3.8%</td>
<td>7.2%</td>
<td>5.6%</td>
<td>3.8%</td>
<td>5.1%</td>
<td>+3% to +4%</td>
</tr>
<tr>
<td>Europe</td>
<td>2.5%</td>
<td>8.8%</td>
<td>5.8%</td>
<td>3.7%</td>
<td>4.6%</td>
<td>+3% to +4%</td>
</tr>
<tr>
<td>Asia and the Pacific</td>
<td>7.7%</td>
<td>5.7%</td>
<td>7.3%</td>
<td>4.6%</td>
<td>7.1%</td>
<td>+5% to +6%</td>
</tr>
<tr>
<td>Americas</td>
<td>3.7%</td>
<td>4.7%</td>
<td>2.4%</td>
<td>2.0%</td>
<td>4.6%</td>
<td>+2% to +3%</td>
</tr>
<tr>
<td>Africa</td>
<td>7.8%</td>
<td>8.5%</td>
<td>8.5%</td>
<td>4.2%</td>
<td>4.4%</td>
<td>+3% to +5%</td>
</tr>
<tr>
<td>Middle East</td>
<td>-4.7%</td>
<td>4.1%</td>
<td>3.0%</td>
<td>7.6%</td>
<td>2.7%</td>
<td>+4% to +6%</td>
</tr>
</tbody>
</table>

Source: World Tourism Organization (UNWTO) ©

* Provisional data
訪日外国人旅行者数と出国日本人数の推移
（観光庁「観光白書2020」）(Inbound & Outbound in Japan)

1964 Restricion on OVERSEAS TRAVEL Lifted

2003 SARS IRAQ WAR
2003 Start of VISIT JAPAN

2011 The Great East Japan Earthquake

2015 Inbound(19m) exceeded Outbound(16m)

資料：日本政府観光局資料に基づき観光庁作成

Yōkoso! JAPAN

Japan. Endless Discovery.
II. Impact of COVID-19 (World & Japan)

Changes in Number of Travelers to Japan in 2020 (Unit: 10,000)

JTB Soken (Feb. 2020)

<table>
<thead>
<tr>
<th>Year</th>
<th>Number</th>
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<tbody>
<tr>
<td>2010</td>
<td>861</td>
</tr>
<tr>
<td>2011</td>
<td>622</td>
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<tr>
<td>2012</td>
<td>836</td>
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<tr>
<td>2013</td>
<td>1,036</td>
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<tr>
<td>2014</td>
<td>1,341</td>
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<tr>
<td>2015</td>
<td>1,974</td>
</tr>
<tr>
<td>2016</td>
<td>2,404</td>
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<tr>
<td>2017</td>
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<td>2018</td>
<td>3,119</td>
</tr>
<tr>
<td>2019</td>
<td>3,188</td>
</tr>
<tr>
<td>2020</td>
<td>3,430</td>
</tr>
</tbody>
</table>

Forecast +7.6%
II. Impact of COVID-19 (World & Japan)

International Tourist Arrivals by month

Source: World Tourism Organization (UNWTO) ©
II. Impact of COVID-19 (World & Japan)

When do you expect tourism demand for your destination will start to recover?

- **By May-June**
  - International: 3%
  - Domestic: 14%

- **By July-September**
  - International: 24%
  - Domestic: 45%

- **By October-December**
  - International: 34%
  - Domestic: 25%

- **By 2021**
  - International: 39%
  - Domestic: 15%
II. Impact of COVID-19 (World & Japan)

Visitor Arrivals to Japan in 2020

出典：日本政府観光局  Source：Japan National Tourism Organization
III. Tourism - The New Normal  (Domestic & Int’l)

[3 essentials of prevention]

☆ REMOTE–WORK
☆ WORKATION

<Change of Tour Type>
(short–term&short–distance travels)
- GROUP ➔ FIT
- Excursion ➔ Long Stay
- Tours by Bus/Train ➔ Driving car /Riding bicycle
- City tour ➔ Ecotourism/
  Green tourism
III. Tourism - The New Normal  (Domestic & Int’l)
[My Strategy for Tourism Revitalization in Japan]

☆Avoiding 3 C’s  ☆Checking the infection situation.

① 1st stage) Domestic tourism promotion
(Travel within prefecture ➔ Travel in a Region ➔ Travel nationwide)

② 2nd stage) Int’l tourism promotion
(Focusing on Int’l tourism: Inbound tourism)
III. Tourism - The New Normal (Domestic & Int’l)

1) DOMESTIC TOURISM CONSUMPTION (2019: 27.9 Trillion Yen)

- Japanese Domestic Overnight Trips
  - Domestic Overnight Trips: 4.8 trillion yen (17.2%)
  - Same-day Trips: 27.9 trillion yen (61.4%)

- International Visitors Domestic Trips
  - 1.2 trillion yen (4.3%)

- Japanese Domestic Overseas Travel (Domestic)
  - 1.0 trillion yen (4.3%)

US$1.00 = ¥105 (approx.)
1) DOMESTIC TOURISM

☆[GO TO TRAVEL CAMPAIGN] domestic travel recovery campaign to boost the domestic travel market (excludes travels from/to Tokyo due to an increase in COVID-19 in Tokyo)

(The government has budgeted 1,680 billion JPY for ‘GO TO Campaign’ to boost tourism in Japan, in which ‘GO TO TRAVEL’ benefits a traveler with a coupon equivalent to half of a product price or up to 20,000 JPY a night through travel agents.[ Travel Voice Jun 01, 2020])

☆Online travel boom in Japan.
- Online Drinking with GEISHA at Hakone (classic Japanese culture and entertainment with Geisha)
- Cultural Experiences (Origami/Japan’s Manga/Meditation)
- Japanese Food Experiences (Become Sake master)
III. Tourism - The New Normal (Domestic & Int’l)

2) International (TRAVEL BUBBLE & RESIDENCE TRACK)

Starting of ‘Travel Bubble’ discussions with four countries. (Vietnam, Thailand, Australia and New Zealand with lower COVID-19 infection status) (Jun, 2020)

Japanese business travelers fly to Vietnam as the first step of reopening borders (End of June, 2020)

talk with 12 designated countries and regions for restart of bilateral travel in East Asia and Southeast Asia (Jul 27, 2020).

“Residence Track” : Starting in September 08, such as Taiwan, Malaysia, Laos, Cambodia, Myanmar after Vietnam & Thailand.

Postponing of the Tokyo Olympics and Paralympics until 2021.
JNTO’s a three-steps roadmap to revive the inbound travel market.
(Travel Voice: July 10, 2020)

**STEP 1 (travel restrictions are still effective both in Japan and the rest of the world)**
1. Consecutive delivery of information to Japan fans on SNS
2. Delivery of information for B to B on webinars

**STEP 2 (reopening of domestic travel both in Japan and the rest of the world, and entry restrictions into Japan are lifted step by step)**
3. Delivery of safe and security information
4. Support local DMOs in creating products designed for new trends
5. Appealing public images of travel in Japan in accordance with new trends

**STEP 3 (travel restrictions on tourists are lifted worldwide)**
6. Restart of promotional campaigns with travel companies or airlines
7. Inviting media, foreign travel agents or SNS influencers to Japan
The Postponed Tokyo Olympics will be a good chance to take advantage of media exposures
IV. Tourism Promotion in Japan & Regional Cooperation-NEA & The Pacific

1. To promote Two-way Tourism

2. To exchange Tourist information including the status of Covid-19

3. To boost development of human resources
[Thank you very much for your attention]

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